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2017 Contact Center Overflow Vendor Request for Proposals Responses to RFP Questions

May 5, 2017

All questions are addressed below:

Q1: Will the vendor's geographic location(s) or potential location(s) be considered during the evaluation process? What affect, if any, will that have on the selection process?

Call center services must be provided at offices located in the United States.

Q2: Whether companies from outside USA can apply for this?

No.

Pursuant to Minn. Stat. 16C.086, call center services must be provided at offices located in the United States. All services under this contract shall be performed within the borders of the United States. All storage and processing of information shall be performed within the borders of the United States. This provision also applies to work performed by subcontractors at all tiers.

Q3: Can we perform the tasks (related to RFP) outside USA?

No.

Pursuant to Minn. Stat. 16C.086, call center services must be provided at offices located in the United States. All services under this contract shall be performed within the borders of the United States. All storage and processing of information shall be performed within the borders of the United States. This provision also applies to work performed by subcontractors at all tiers.

Q4: Can we submit the proposals via email?

No. The following will not be accepted and/or considered: Late proposals; proposals submitted via fax; or proposals submitted electronically via email.

Q5: Would agents be needed year-round in addition to peak enrollment season?

The vendor shall provide staff year-round with a team size determined by MNsure.

Q6: Is the NDA included in the RFP, page 29 of 45, titled Professional and Technical Services Contract?

MNsure's contract is included as Attachment 7. If you take exception to any of the terms, conditions or language in the contract, you must indicate those exceptions in your response to the RFP; certain exceptions may result in your proposal being disqualified from further review

and evaluation. Only those exceptions indicated in your response to the RFP will be available for discussion or negotiation.

Q7: Can you send me your company MNDA or should I send you ours?

MNsure's contract is included as Attachment 7. If you take exception to any of the terms, conditions or language in the contract, you must indicate those exceptions in your response to the RFP; certain exceptions may result in your proposal being disqualified from further review and evaluation. Only those exceptions indicated in your response to the RFP will be available for discussion or negotiation.

Further, see the section titled "Disposition of Responses." All materials submitted in response to this RFP will become property of the State and will become public record in accordance with Minnesota Statutes, section 13.591, after the evaluation process is completed. If the Responder submits information in response to the RFP that it believes to be trade secret materials, as defined by the Minnesota Government Data Practices Act, Minnesota Statute § 13.37, the Responder must follow the directions at pages 15-16 in the RFP.

Q8: An RFP for an "overflow" call center vendor suggests you have your own in-house call center, is that correct?

Yes, MNsure has a contact center in St. Paul, MN.

Q9: Have you used an overflow vendor in the past?

Yes.

Q10: Is that the total call volume for the overflow vendor or is that the total call volume for the entire program?

The volume listed is what was handled by the vendor during the previous open enrollment period.

Q11: If that is call volume for the entire program, do you know what the call volume was for the overflow vendor that took overflow calls?

Not applicable due to answer at Q10.

Q12: If there was not previously an overflow vendor, what percent of the calls do you forecast will go to the overflow vendor?

Not applicable due to answer at Q10.

Q13: Are we able to submit a copy of the most recent tax returns for a financial statement?

See page 11, Section 3 of the RFP, Financial Stability. Among other items, Responders must submit documentation sufficient to substantiate responsible fiscal management.

Q14: Do you need a certificate from the bank for cash reserves?

See page 11, Section 3 of the RFP, Financial Stability. Among other items, Responders must submit documentation sufficient to substantiate responsible fiscal management.

Q15: Do you allow work from home agents who are not employees of the contracted vendor?

See page 10, Section 1 of the RFP. Proposals from single organizations equipped to perform all the tasks or from a lead contractor with subcontractors are welcome. If an organization proposes to carry out actions associated with this RFP with the assistance of subcontractors, those subcontractors and their roles must be specifically identified in the cover letter.

Q16: If we have Independent businesses who are the subcontractors who will be doing this work, will we have to list all named independent businesses in our RFP response (there could be over 200)?

See page 10, Section 1 of the RFP. Proposals from single organizations equipped to perform all the tasks or from a lead contractor with subcontractors are welcome. If an organization proposes to carry out actions associated with this RFP with the assistance of subcontractors, those subcontractors and their roles must be specifically identified in the cover letter.

Q17: Will you allow use of Home Agents?

All eligible Responders will be evaluated based on the terms of the RFP. Home agents are not prohibited. Include information on how you communicate with, train and coach your remote employees.

Q18: Are agents required to hold any insurance industry license or certifications? If so which ones?

No licenses or certifications are required.

Q19: Can you confirm that the daily overflow call minutes are 24,910?

Call minutes vary daily. Historical call volumes are included in Table 1 below. Historical volumes and forecasts by interval will be available to the contracted vendor.

Q20: Can you confirm the daily hours requirement is 415?

Call hours and staffing requirements vary daily. Historical call volumes are included in Table 1 below. Historical volumes and forecasts by interval will be available to the contracted vendor.

Q21: 6.5 states that MNsure shall provide refresher and updated training at the beginning of each enrollment period. How long is this refresher training typically?

Refresher training for open enrollment can be completed in one to two days. MNsure will provide initial training up to three weeks onsite, including resources and support. Train-the-trainer will run concurrently during this period of time.

Q22: Can you provide an example of "special event-based training" requirement is?

After the last open enrollment period, MNsure initiated a special enrollment period open to all consumers in response to a recently passed premium assistance law. A document of talking points and frequently asked questions was used to educate agents about this program.

Q23: Are training manuals a part of the initial training resources provided by MNsure or will we need to create them?

MNsure will create training manuals and other resources, but printing, or converting to another format, is the responsibility of the vendor.

Q24: Can MNsure provide call volume for the non-open enrollment period?

In general, call volume outside of open enrollment is between 900 and 1500 calls/day, but can go higher. See Table 1 below for historical call volume.

Q25: What is the criteria for the selection of calls to be routed to the vendor? Percent allocation, pure overflow, specific coverage periods, etc.?

Almost exclusively, a percent allocation.

Q26: Is the open enrollment call volume provided the total call volume or what was routed to the vendor?

The volume listed is what was handled by the vendor during the previous open enrollment period.

Q27: What system platform(s) will the vendor be required to connect to and how is connectivity achieved (i.e., remote desktop, web based applications, VPN connection)?

The vendor will be required to connect to MNsure's web-based CRM and eligibility tools via Citrix.

Q28: Can MNsure further describe the Manual "back-office" operations that will be required of the vendor?

To be determined. Examples might include a) updating data in our web-based system, b) data entry in Excel or a web-based tool.

Q29: Does the 8 – 9 minutes/call cited include talk, hold and wrap-up time?

Yes, total average handle time has been between eight and nine minutes.

Q30: Can MNsure provide the call volume for the overnight hours (i.e. – 10p – 6a)?

We are not open during overnights. Outside of open enrollment, we are open Monday-Friday from 8 a.m. to 5 p.m. During open enrollment, hours will be extended and include weekends.

Q31: Will the MNsure call center be covering the same hours and days that are required of the vendor or will there be times where the vendor will solely be staffing the call center operations?

The MNsure call center will be open when the vendor is open. There could be small periods where only the vendor takes calls (meetings, trainings, etc.).

Q32: If there are times where the vendor will solely be responsible for call center operations, can you provide details on those days and times?

These times, if any, are to be determined.

Q33: Item 6.2 states that MNsure will provide initial training up to three weeks onsite. Is training for new agents and the train-the-trainer anticipated to take the full three weeks?

Unsure at this time.

Q34: What is the frequency with which the Quality Control reports are to be sent?

Weekly.

Q35: Are licensed agents required for any part of the business?

No licenses or certifications are required.

Q36: The estimated award date is May 31, 2017, and the timeframe for service is June 2017. Can you provide clarification on the timeframe for when training would begin?

We estimate technical integration work to be July-August and agent training to be August-September.

Q37: What information is to be contained in the Quality Control reports?

"Rolled up" quality scores, trends and highlights.

Q38: Is the vendor required to use Quality Control tools supplied by MNsure? If so, can these tools be provided for review?

The vendor will use the MNsure quality control rubric within the vendor's own quality control tool.

Q39: RFP says that operating hours are Monday to Friday, 8 am to 5pm CT, but on the Vendor's task, it says that Call center need to cover 24 hours and 365 days. So do you need after hour service?

While we expect our vendor to be able to provide 24/7/365 service, we do not intend to make use of extended hours except during exceptional circumstances. We have not required after-hours service in the past. We do, however, require a contact from the vendor to be available 24/7/365 to respond to unforeseen circumstances.

Q40: How much the portion of each IVR and live agent calls?

All call volumes specified in the RFP are live agent calls.

Q41: How many daily or weekly or monthly call for after hours?

Hours of operation outside of open enrollment are M-F, 8 a.m.-5 p.m. During open enrollment, hours will be extended and include Saturday and Sunday. The final schedule is to be determined, but we value flexibility.

Q42: Do you need state business license for any specific state?

No licenses or certifications are required.

Q43: On Page 12, the table shows the billing element description, like 300, 350 sessions. What does mean by sessions?

Session is the number of communication paths that the State of Minnesota is looking to connect to the awarded Responder. This reflects the capacity requirements that the contract vendor will need to provide.

Q44: Can the office be located in anywhere in the U.S.?

Yes.

Q45: Do you want agents work only for MNsure? Or do you accept the shared?

If both options are available, please include the best value in your proposal.

Q46: Do you currently use another vendor to provide these services?

Yes.

Q47: Why is this out for bid at this time?

MNsure's current contract expires June 30, 2017.

Q48: can you share the rate you currently pay to this vendor?

Yes. If you would like to submit a data request to MNsure, please complete our Data Practices form and follow its instructions (https://www.mnsure.org/assets/DataPracticesRequestForm_tcm34-183547.pdf).

Q49: Do you have an hourly breakdown of the number of calls per hour?

Historical and forecasted call volume at the interval level will be provided to the vendor.

Q50: What is the current average call length?

Average handle time is eight to nine minutes.

Q51: What is the estimated wrap up time to complete notes/system updates?

Average wrap time is under two minutes.

Q52: What is the team size that MNsure recommends? How many FTE does MNsure expect on this project?

During the last open enrollment period, the MNsure vendor had approximately 150 FTE. Conditions may require higher staffing levels for the next open enrollment period. Outside of open enrollment, staffing needs are typically between 25 and 35 FTE.

Q53: From the provided historical call information, what is the anticipated % of activity that will be overflow to your vendor?

The vendor is generally the first point of contact. MNsure has the ability to flex allocations as needed.

Q54: In the past did MNsure outsource this activity? If yes, what are areas of service support improvement that you will focus on?

Yes. Among other things, MNsure will focus on staffing flexibility and call quality/compliance.

Q55: During past open enrollment periods, what were the operating hours of the call center?

M-F 8 a.m.-6 p.m., Sat 8 a.m.-4:30 p.m., Sun 8 a.m.-noon, with extended hours around deadline dates.

Q56: Can MNsure provide this same historical call arrival activity by day of week in either ½ hour or 1-hour increments?

Historical call volumes are included in Table 1 below. Historical volumes and forecasts by interval will be available to the contracted vendor.

Q57: Did MNsure experience any business anomalies or unexpected spikes in call activity?

Yes, technical issues along with insurance carrier caps resulted in higher than anticipated volume.

Q58: What information, PHI/PII will the vendor retain?

PII may be gathered and entered into a CRM, no PII shall be retained outside of the assigned systems.

Q59: Will MNsure provide the toll-free number to accept trouble reports from the State?

The vendor will provide a toll-free number to receive trouble reports.

Q60: What is the historical call volume on the trouble reporting line?

Very low. Less than six calls/year.

Q61: What is the percent or volume of outbound call activity? How many records on a daily/weekly/monthly basis?

Less than 1%; only in rare cases would MNsure ask for outbound calls to be made.

Q62: What percent of calls are password resets? What is average handle time of password reset calls?

Roughly 33% of calls are password resets; average handle time of approximately seven minutes.

Q63: What form of communication are the responses? Will MNsure provide/approve the responses?

Voice responses. MNsure will provide training and responses.

Q64: Will the vendor conduct any mailings on behalf of MNsure? If so, recommendations on indicia and postal mark since MNsure is to only be branded.

No mailings will be required.

Q65: What is MNsure's internal QA score? Will they be shared? Will MNsure also conduct QA evaluations on the vendor?

MNsure QA team will coordinate with the vendor QA team. MNsure may independently evaluate vendor calls as needed.

Q66: This outlines who the reports will go to; what are the 3 reports MNsure would like delivered on a daily basis?

This refers to the same report delivered to three MNsure staff.

Q67: Please indicate timeframe for the QC monitoring of 15 calls or 2% for QA, i.e. daily/weekly.

Quality control reporting should be delivered weekly.

Q68: Confirming that training/education is a 3-week program? What is MNsure's expected end of training proficiency passing grade?

Training may be from two to three weeks; expected 80% successful completion rate.

Q69: Please confirm that refresher training prior to OE is billable to MNsure.

Yes, agent hours for training are billable to MNsure.

Q70: Please confirm that the intent of MNsure is that attrition training is the responsibility of the vendor?

Yes. Attrition training as well as any "ad hoc" trainings that might be required.

Q71: Relative to call processing methodology, what is the preferred method of MNsure to transfer call activity to the vendor?

Calls will route to the vendor from our IVR.

Q72: Does the current MNsure contact center staff fully cover the volumes reported in the 2016/2017 Open Enrollment Call Volume table? If not, what percentage of open enrollment calls is overflow?

The vendor that is selected should expect to handle the volume of calls listed in the RFP.

Q73: We are a privately owned company. Can we mark our financial statement or independent audit as proprietary and confidential, or will these materials be published in the public record?

The State will not consider the prices submitted by the Responder to be proprietary or trade secret materials. See the section titled "Disposition of Responses" beginning at page 15. All materials submitted in response to this RFP will become property of the State and will become public record in accordance with Minnesota Statutes, section 13.591, after the evaluation process is completed. If the Responder submits information in response to the RFP that it believes to be trade secret materials, as defined by the Minnesota Government Data Practices Act, Minnesota Statute § 13.37, the Responder must follow the directions at pages 15-16 in the RFP.

Q74: Is the value of the contract calculated over the two base years + 3 option years? If a form does not apply to our bid, may we leave it out or would you prefer we submit it marked "N/A"?

The value of the contract is calculated over the initial two-year period based on all of the cost factors provided within the bid response.

Q75: What is MNsure's definition of "session"?

"Session" is equal to a trunk. From the State's point of view, a session provides one call to the Contact Center or the Contact Center agent makes a call out.

Q76: Please clarify that the "overflow vendor" is the front-line call center?

The vendor selected will handle most initial inbound calls. MNsure will also handle a percentage of total calls.

Q77: Who is the incumbent on the current Contact Center Overflow Vendor contract?

Data Listing Services, Inc., dba, The Connection

Q78: Are we able to receive copies of the invoices for the past 12 months from your current vendor? This would be to fully understand the exact current costs and structure of the relationship.

Yes. If you would like to submit a data request to MNsure, please complete our Data Practices form and follow its instructions (https://www.mnsure.org/assets/DataPracticesRequestForm_tcm34-183547.pdf).

Q79: Is the "Call Enrollment Call Volume" total calls, or the number of calls that are sent to the Overflow Partner?

The call volume in the RFP is the total volume of calls handled by the vendor.

Q80: How many calls went to the overflow partner?

The call volume in the RFP is the total volume of calls handled by the vendor.

Q81: Do you expect an increase, decrease or similar number of contacts in 2017?

In a changing market, accurate call volume forecasts are difficult. We are anticipating having a shorter OE/busy season. As a result, we will likely see more call volume in the fourth quarter, compared to last year.

Q82: Could you please provide Call Volume for the remainder of the year and your projection on the number of calls and timelines for the calls that will be supported by the Overflow Vendor?

Historical call volumes are included in Table 1 below. Historical volumes and forecasts by interval will be available to the contracted vendor.

Q83: Do you prefer a per minute pricing strategy or a per hour pricing strategy?

If both options are available, please include the best value in your proposal.

Q84: Is there any consideration or benefit to MN based contact center providers?

Possibly. See attachment 6 of the RFP. Resident Vendor status may be considered for purposes of resolving tied low bids or the application of a reciprocal preference.

Q85: Do the statistics listed reflect the total call volume, or the call volume sent to the overflow vendor? If reflective of total call volume, are you able to estimate the number or % of calls to be sent to the overflow vendor?

The vendor that is selected should expect to handle the volume of calls listed in the RFP.

Q86: Are historical or projected call volume statistics available for periods outside the open enrollment period?

Historical call volumes are included in Table 1 below.

Q87: Whether we need to come over there for meetings?

Please propose what you think will be best for the client. Include any costs in the cost proposal.

Q88: Are you able to provide historical or projected call volume statistics by hourly interval?

Historical call volumes are included in Table 1 below. Historical volumes and forecasts by interval will be available to the contracted vendor.

Q89: Are the Knowledge Management System and Client Relationship System web-based? If not, can you tell us how those systems are accessed?

Yes, they are web-based.

Q90: Regarding System Troubleshooting, Section 2.4. Can you define 'call module' as it pertains to this section?

"Call module" means consumer inquiry expressed on an inbound call.

Q91: Regard Quality Control, Section 4.1. Can you specify the time frame for this requirement? Is this per week or per month?

The expectation is based on total monthly call volume.

Q92: Will an MPLS connection need to be established for SIP to SIP connection?

Yes, it would require a dedicated site-to-site connection. A VPN connection over the internet does not support QoS so it wouldn't be considered a reliable connection for this service.

Q93: Our company is veteran-owned and located outside of Minnesota. Will certification of our veteran-owned status by the U.S. Department of Veterans Affairs qualify us for veteran-owned preference?

No; see attachment 5 of the RFP.

Q94: Can you specify the travel requirements which will be expected of the selected overflow vendor?

We would not expect more than one in-person visit each year.

Table 1. Historical Monthly Call Volume

Month	Vendor Call Volume
Jan-16	90658
Feb-16	49232
Mar-16	54242
Apr-16	38153
May-16	28425
Jun-16	29255
Jul-16	15955
Aug-16	19138
Sep-16	22791
Oct-16	33131
Nov-16	65085
Dec-16	75073
Jan-17	79531
Feb-17	44891
Mar-17	29404